



U.S. General Services Administration

Federal Acquisition Service

Client Order Information (COI)

GSA User Training developed for IWAC RBA Extension project

COI Training Module Overview

Objective: This training module will take you step-by-step through the Client Order Information (COI) document in the Regional Business Application (RBA) IT-Solutions Shop (ITSS) component.

Navigation: If the tutorial opens up in your web browser, simply click your mouse or your space bar to advance to the next slide. Use the “Backspace” key to go back. If the tutorial opens in the PowerPoint application, click on “F5” to view the tutorial. Use the spacebar or click your mouse to advance to the next slide. To go back, click on the “Backspace” key.

COI Glossary

Term	Definition
CO	Contracting Officer
COM	Commodity fiscal task type
Commodities	An order for hardware, software, may also include installation.
COST	Cost fiscal task type
CSR	Customer Service Representative
FFP	Firm Fixed Price fiscal task type. A task in which one price covers all costs.
FM	Fund Manager
FURNTR (FR)	Furniture Program Type (Budget Activity). Used specifically by IWAC.
IA	Interagency Agreement
IWAC	Integrated Workplace Acquisition Center
LAB	Labor fiscal task type.
PCOC	Preparing Contract Office Code. The system collects the required PCOC value so that PIID Code can be generated. PCOC value depends on the user's default 'Region' or 'Program'. For Region 31, the PCOC value is BU000.
Peer Access List	Includes members of the same registered organization as the primary client, with limited access to the order.
PIID	Procurement Instrument Identifier. See the <i>Standardized Numbering Conventions</i> training module for more information.

COL Privileges

User Role Action	Create	Edit	View
GSA User	✓	✓	✓
Client			✓
Contractor			✓*

*Contractors may view if they are on the BOMSOW Contractor List

Click on the COI link in the Order Package View to open an existing COI in view mode. Only one COI document exists per order.

GSA IT-Solutions Shop
You are signed in as Christopher CSR

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WELCOME **ORDERS** **FUNDING** **REGISTRATION** **CONTRACTS**

Select a View:

<<-- View Orders --> <<-- View Inactive Orders --> <<-- View Action Items --> <<-- View Support Information -->

Go to a Specific View Item: [Create New Order](#)

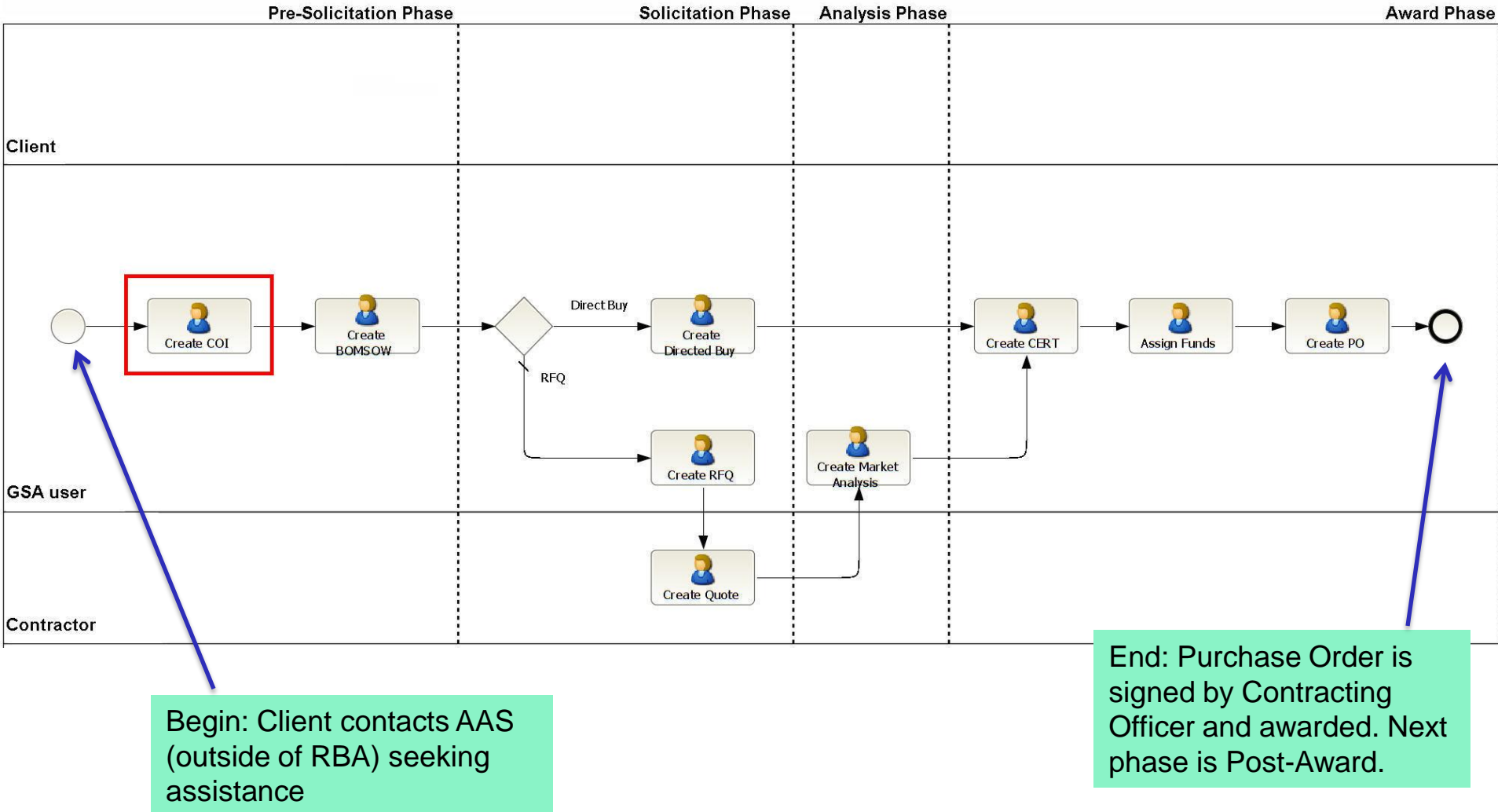
Orders - Entire Package

Next -> |

- Order Package
 - ID31120022-COI Sarah Client (Organization Name) GSA Evaluating>>Furniture procurement
 - 00 Chronology
 - 01 Electronic Contract File (ECF)
 - 01 BOM/SOW ID31120022 - 000 Amendment 00 IN-PROCESS

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Within the Pre-Award Workflow Context



GSA U.S. General Services Administration AAS Business Systems Portal

Welcome Christopher CSR!

IT-Solutions

AAASBS Helpdesk: 877-472-4877
AAASBS.helpdesk@gsa.gov

Welcome | Orders | Funding | Registration | Contracts

IT-Solutions Shop

Welcome to the IT-Solutions Shop

IT-Solutions Shop (ITSS) is an online, web-based purchase order system designed to facilitate the development of delivery and purchase orders within FAS programs. ITSS provides convenient access to a centralized work environment where orders are submitted, processed, and awarded.

Need Assistance?

Technical Support and Registration
Call: (877) 472-4877
Email: AAASBS.helpdesk@gsa.gov

[Create a Feedback](#)
[View Feedbacks](#)
[Guide Me](#)
[Site Help](#)
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Directory

Registration: [Client](#) [Contractor](#) [GSA](#) [Registering for Clients or Contractors](#)
IT-Solutions: [Overview](#) [Web site](#) [GSA](#) [Browser Requirements](#) [Firewall Issues](#) [Help Lite - Vendors](#) [Help Lite - Clients](#)
GSA Information: [About GSA](#) [GSA Regions](#) [Public Building Serv](#) [Federal Acquisition Service](#)
Program Information: [Assisted Acquisition Service](#) [GSA - GWACS](#) [Office of Integrated Technology Services](#) [Agency-wide Interagency Agreement](#)

ITSS Quick Links

Go to a Specific Order in Integrated: Go

[Create New Order](#)
[View Orders by Order ID](#)
[View Orders by ACT Number](#)
[View Funding Documents](#)
[Go to Legacy](#)

ITSS Action Items

<<-- View Action Items -->>

Action Item Link

You have no action items

Showing 0 results.

System Announcements

Entries

ITSS Reports

RBA Task Overview Report

Please enter an Order ID: View Report

FAS RBA Customer Funding Statement

Please enter a Funding Document number: View Report

RBA Small Business Invoice R

Region 31 View Report

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GSA user may generate a COI by first clicking on the *Create New Order* link either on the ITSS Welcome page or the ITSS Orders Tab. A new page will load prompting GSA user to select a client.

GSA IT-Solutions Shop

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WELCOME | **ORDERS** | FUNDING | REGISTRATION | CONTRACTS

Select a View:

By Order ID <<-- View Inactive Orders -->> <<-- View Action Items -->> <<-- View Support Information -->>

Go to a Specific View Item: Go [Create New Order](#)

Orders - By Order ID

Next -> |

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WELCOME **ORDERS** **FUNDING** **REGISTRATION** **CONTRACTS**

Select A Client From The List Below

Go to a Specific Client:

[Next ->](#)


- Aaron Client (Department of Agriculture)
- Ada Client (HQ NAIC)
- Adrianne Client (90 Communications Squadron)
- Albert Client (81st Medical Group)
- Allen Client (Department of Veterans Affairs)
- Allison Client (Center for Information Technology)
- Amber Client (Headquarters Air Combat Command(ACC/XP))
- Andrew Client (USAF EC/EOS)
- Angeline Client (USAID)
- Antoine Client (Battle Command Battle Lab)

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Enter part of a name and click Go to jump to matching client names

The client list is sorted alphabetically by first name

The client list displays 30 names at a time. Use the Next / Previous arrows to see more clients


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WELCOME | **ORDERS** | FUNDING | REGISTRATION | CONTRACTS

Client Order Information



Close Without Saving

Client Rep: Sarah Client (Organization Name)
 Submitted By: Christopher CSR at 02/07/2012
 Order Status: **Draft**

All Fields marked with  are required.












▼ Preliminary Requirements Description

Enter a one-line description of this order for identification in views

Project Descriptor:
 Estimated \$ Value:
 Funding Type:  REGULAR 
 GSA Cust Service Representative: Christopher CSR

Client's Address Information

Client Addressing Information:

Client Agency:  17 DEPARTMENT OF THE NAVY
 Client Organization:  Organization Name
 Client Phone:  (619) 555-0105 Ext:
 Client Fax:  (619) 555-0106
 Address, Line 1:  123 Main St.
 Address, Line 2:
 City:  Springfield
 State/Province:  CA 
[Click here for state abbreviation descriptions](#)
 Zip/Postal Code:  95370
 Country:  United States 

The status of the entire order

Enter a description to identify the entire order

Enter the total estimated dollar value of the order. Used for reporting purposes.

Only orders with regular funding can have *fee-only* task items

The Client's Address Information defaults to the client address on the client's user profile

Accepting Person's Address & Contact Information**Accepting Person's Address and Contact Information:**

Accepting Person:

E-mail Address:

Direct Phone #: Ext:

Fax #:

Address, Line 1:

Address, Line 2:

City:

State/Province: [Click here for state abbreviation descriptions](#)

Zip/Postal Code:

Country:

The Accepting Person's Address & Contact Info defaults to the client info on the client's user profile

▼ Shipping Address or Place of Performance

If multiple ship-to addresses are required for this order, please select the option below. All references to or Statement of Work.

Are there Multiple Ship-To Addresses on this order? ☐ Yes ☒ No

If the order has multiple shipping addresses select Yes. Users can add the additional addresses on the BOMSOW.

Materials

Attention:

E-mail Address:

Phone: Ext:

Address, Line 1:

Address, Line 2:

City:

State/Province: [Click here for state abbreviation descriptions](#)


Zip/Postal Code:

Country:

The Shipping Address or primary Place of Performance defaults to the client info on the client's user profile


▼ **GSA Order Specifics**

 All Fields marked with  should be filled in by a GSA Representative.

Region:  31. IWAC Region

Program: Furniture

Preparing Contracting Office Code: BU000 GSA/FSS Office Furniture Division - IWAC (R31)

Territory:  Philadelphia-PA

You may associate the order to an existing Order ID, or an Order ID will be generated and displayed to you upon Submit or Save of this form.

Order ID: [To Be Generated]

Originating Order ID:

Originating ACT Number:

IA Number(s):

IA Attachment(s):

File Attachments:






Select the Region and Territory.
Program **Furniture** and PCOC will be automatically populated for Region 31.

Order ID will be automatically generated. Optionally, you can associate an order to an existing Order ID. See the *Standardized Numbering Conventions* training module for additional information.

If the order was transferred from a region, enter the original order's Order ID and ACT number. Used for reporting purposes.


▼ **GSA Order Support**

 All Fields marked with  should be filled in by a GSA Representative.

1. Cust Svc Rep:  Christopher CSR

2. Cust Svc Rep: << Select Customer Service Rep >>

3. Cust Svc Rep: << Select Customer Service Rep >>

Fund Manager:  << Select Fund Manager >>

Contracting Officer: << Select Contracting Officer >>

Alt Contract Officer: << Select Contracting Officer >>

▶ **Edit History**

Save As
Draft

Submit and Proceed
To BOMSOW

Close Without
Saving

▼ **GSA Order Specifics**

All Fields marked with should be filled in by a GSA Representative.

Region: 31. IWAC Region

Program: Furniture

Preparing Contracting Office Code: BU000 GSA/FSS Office Furniture Division - IWAC (R31)

Territory: Philadelphia-PA

You may associate the order to an existing Order ID, or an Order ID will be generated and displayed to you upon Submit or Save of this form.

Order ID: [To Be Generated]

Originating Order ID:

Originating ACT Number:

IA Number(s):

IA Attachment(s): **File Attachments:**



Enter the Interagency Agreement (IA) Number and/or attach a copy of the signed IA.

▼ **GSA Order Support**

All Fields marked with should be filled in by a GSA Representative.

1. Cust Svc Rep: Christopher CSR

2. Cust Svc Rep: << Select Customer Service Rep >>

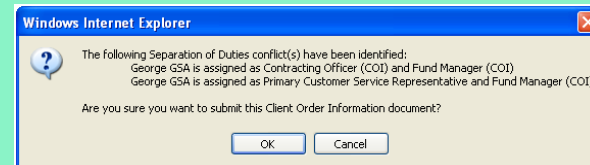
3. Cust Svc Rep: << Select Customer Service Rep >>

Fund Manager: Francine FM

Contracting Officer: Connie CO


Alt Contract Officer: << Select Contracting Officer >>

Select the users assigned to the order. Selection of the CO is required upon creation of the CERT. If a user is selected for multiple roles, a soft validation will warn that a separation of duties conflict has been identified:

▶ **Edit History**


▼ **GSA Order Specifics**

 All Fields marked with  should be filled in by a GSA Representative.

Region: 

Program: Furniture

Preparing Contracting Office Code: BU000 GSA/FSS Office Furniture Division - IWAC (R31)

Territory: 

You may associate the order to an existing Order ID, or an Order ID will be generated and displayed to you upon Submit or Save of this form.

Order ID: [To Be Generated]


Originating Order ID:


Originating ACT Number:

IA Number(s):

IA Attachment(s): **File Attachments:**


▼ **GSA Order Support**

 All Fields marked with  should be filled in by a GSA Representative.

1. Cust Svc Rep: 

2. Cust Svc Rep:

3. Cust Svc Rep:

Fund Manager: 

Contracting Officer:

Alt Contract Officer:

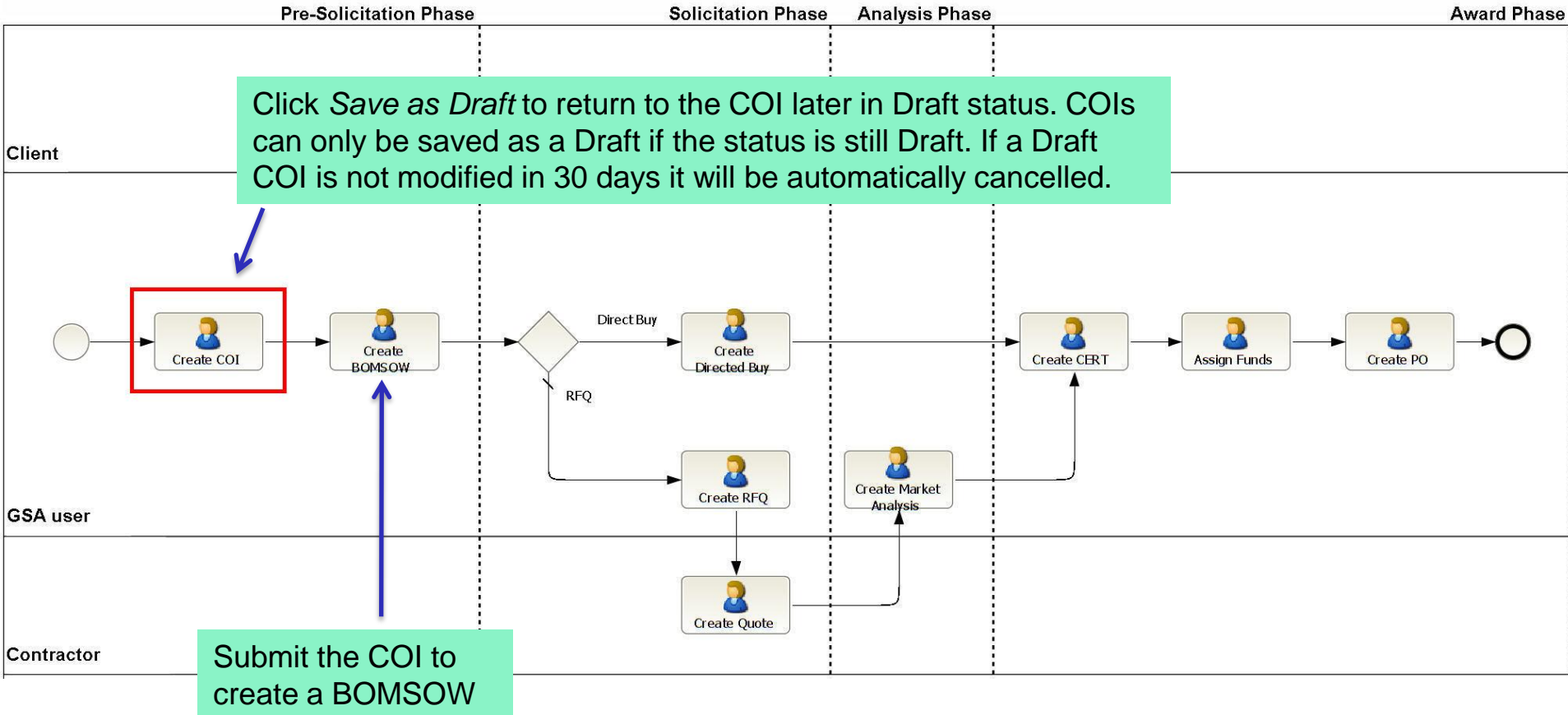
▶ **Edit History**

GSA users do not select a fiscal order type on the COI. The fiscal order type is derived based on the fiscal task types of the task items awarded on the basic order.

If the order contains at least one task item with fiscal task type LAB, COST, or FFP then the user can add any type of task item (LAB, FFP, COM, COST, or FEE) during an Order Mod.

If the order does not contain a LAB, COST, or FFP task item then the user will only have the ability to add COM or FEE task items during an Order Mod.

Next Steps...



COI Status Glossary

Status	Definition
Draft	COI has been initially submitted, remains in draft status until BOMSOW is created.
GSA Evaluating	BOMSOW has been submitted for GSA Review by GSA and there is not an open RFQ.
Directed Buy	Directed Buy has been created.
RFQ	RFQ has been issued but winning quote has not yet been selected.
Quote Selected	Quote has been selected on Market Analysis.
Pending Client Acceptance	Market Analysis is pending approval from Client.
Pending Approving Official Acceptance	Market Analysis is pending approval from GSA Approving Official.
Quote Accepted	Client has accepted selected Quote on Market Analysis
Approving Official Accepted	GSA Approving Official has accepted Market Analysis
Awarded – Mod [XX]	Mod number [XX] has been signed by Contracting Officer.
Cancelled	Order has been marked inactive by CSR prior to any signed Purchase Orders.
Complete	Order has been marked inactive by CSR after at least one signed Purchase Order.

Federal Acquisition Service

Questions & Support

- For questions regarding AAS Policy please contact randy.matlack@gsa.gov or robert.niewood@gsa.gov
- For questions regarding the RBA COI training module please contact RBA Technical Support:
 - Phone: 877-472-4877
 - Email: AASBS.helpdesk@gsa.gov

